



# Release Notes for Data Entry Workflow 10.0.41.18

Release Notes

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# Document Information

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# 1. Introduction

## 1.1 Purpose

This document highlights new features, bug fixes and improvements in this release of Data Entry Workflow (DEW) 10.0.41.18 from Staedean B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Supply Chain Management, 10.0.37 and higher.

## 1.2 Audience

This document is intended for new users of Data Entry Workflow partners and customers. Some knowledge of Dynamics 365 for Finance and Supply Chain Management is assumed.

## 1.3 Deliverables

Deliverable	Description
<b>Solution package</b>	Data Entry Workflow is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
<b>Software deployable package</b>	Data Entry Workflow 10.0.41.18
<b>Release notes</b>	This document is provided with the Data Entry Workflow product deliverables.
<b>Implementation methodology</b>	The solution package contains a <i>Data Entry Workflow implementation methodology</i> that provides detailed step-by-step instructions on how to install, learn, and implement the solution.
<b>Getting started BPM library</b>	The solution package includes a <i>Getting started with Data Entry Workflow</i> BPM library. This library contains several task guides that showcase some of the key capabilities of Data Entry Workflow.
<b>Documentation BPM library</b>	We are working on the documentation for <i>Data Entry Workflow</i> . This is not published as BPM library on the moment of this release.
<b>Authentication assets</b>	A STAEDEAN security certificate is provided to allow trusted installation of the provided model files and ISV license files.

## 1.4 Product Release information

Data entry workflow 10.0.41.18 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.37. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on this version means that it can be applied to an environment running on D365 version 10.0.37 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.41, we recommend applying our Staedean product release on that MS version as well. If



you deviate from this (and thus apply the release to a different version), we recommend performing a more thorough round of testing before applying the release to a production environment.

This is summarized in the following table.

Release date	Staedean Version No.	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
10/01/2024	10.0.37.12	10.0.34	10.0.37	10.0.34 and above
9/02/2024	10.0.38.13	10.0.35	10.0.38	10.0.35 and above
09/04/2024	10.0.39.14	10.0.36	10.0.39	10.0.36 and above
09/07/2024	10.0.40.15	10.0.37	10.0.40	10.0.37 and above
02/10/2024	10.0.41.16	10.0.37	10.0.41	10.0.37 and above
25/10/2024	10.0.41.17	10.0.37	10.0.41	10.0.37 and above
09/12/2024	10.0.41.18	10.0.37	10.0.41	10.0.37 and above

In case of an Error, Staedean may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. Staedean cannot be obliged to provide Hotfixes if Client has not deployed the latest Release or the Release second to the latest Release and/or is not using a supported version of Microsoft Dynamics.

To ensure our customers can fully leverage the latest enhancements, features, and quality improvements, we are committed to providing increased support by keeping them updated with the most recent releases. Our data indicates that customers on the latest version experience fewer issues and requests, demonstrate greater resilience, and effectively enhance their organizational efficiency.

More information about our latest available product versions, the latest validate GA-versions from Microsoft as well as the Minimum MS version required, please visit this page : [Knowledge Base - Support - Staedean](#)

## 1.5 SHA256 algorithm for licenses

You may have already been informed by Microsoft, that licenses that are generated using the SHA1 algorithm will no longer be supported starting at Microsoft Dynamics 365's F&SCM version 10.0.39. This update will be generally made available by Microsoft on March 15th, 2024.

As we currently use the SHA1 algorithm for our licenses, there is an action for you to take to ensure you can continue using our services. We introduce the new SHA256 algorithm for our licenses, which will be supported going forward by Microsoft.

- What do you need to do before updating to version 10.0.39?
- Please go to the Solution Management Workspace in your F&SCM environment

Retrieve and install these licenses based on the SHA256 algorithm. You can find a guide on how to do that under this link

After retrieving and installing the new license, you can upgrade to version 10.0.39 without any interruptions to our services.



There should be no effect on any of your performance. In case you experience any effect, please reach out to us under [customeroperations@staedean.com](mailto:customeroperations@staedean.com)



## 2. What's New

### 2.1 Current release

No new features.

### 2.2 Release 10.0.41.17

No new features.

### 2.3 Release 10.0.41.16

#### 2.3.1 Vendor template design accelerator follow-up enhancement

As per the current implementation of data entry workflow, a user can define the following elements in a vendor template using template accelerator framework:

- Vendor main data
- Vendor's address information
- Vendor's contact information

This enhancement will allow a data entry workflow user to also define the following elements as well:

- Vendor Contact Person
- Bank Accounts

#### Configure data entry workflow template

- Welcome
- Configuration
- Summary

Please select the elements to create for your workflow.

Vendor main data	Performs the base operations for vendor template accelerator scenarios
<input checked="" type="checkbox"/> Yes	
Vendor address information	Define vendor addresses in your template
<input type="checkbox"/> No	
Vendor contact information	Define vendor contact information in your template
<input type="checkbox"/> No	
Vendor contact person	Define vendor contact persons in your template
<input checked="" type="checkbox"/> Yes	
Vendor bank accounts	Define vendor bank accounts in your template
<input checked="" type="checkbox"/> Yes	

For the *Contact person*, application allows the user to select from the following information:

#### 1. General





2. Phone
3. Email
4. Fax and,
5. Address

For the *Bank Details*, application allows the user to enable bank details in the template.

### **2.3.2 Product template design accelerator follow-up enhancement**

As per the current implementation of data entry workflow, a user can define the following elements in a vendor template using template accelerator framework:

- Product Main data
- Product image
- Product translation
- Unit Conversions
- Product attributes

This enhancement will allow a data entry workflow user to also define the following elements as well:

- Trade agreement
- Cost price
- Product categories
- Warehouse Items
- Physical dimensions
- Related Products
- Item Barcode



### Configure data entry workflow template

- Welcome
- Configuration**
- Product main data
- Summary

Please select the elements to create for your workflow.

Product main data	<input checked="" type="checkbox"/> Yes	Performs the base operations for product template accelerator scenarios
Product images	<input type="checkbox"/> No	Define product images in your template
Product translation	<input type="checkbox"/> No	Define product translation in your template
Unit conversion	<input type="checkbox"/> No	Define unit conversion in your template
Physical dimensions	<input checked="" type="checkbox"/> Yes	Define product physical dimensions in your template
Product categories	<input checked="" type="checkbox"/> Yes	Define product category in your template
Product attributes	<input type="checkbox"/> No	Define product attribute in your template
Trade agreement	<input checked="" type="checkbox"/> Yes	Define product trade agreement in your template
Cost price	<input checked="" type="checkbox"/> Yes	Define product cost price in your template
Warehouse items	<input checked="" type="checkbox"/> Yes	Define warehouse items in your template

Related Products and Bar Codes are available in Product Main Data section.

### Configure data entry workflow template

- Welcome
- Configuration
- Product main data**
- Physical dimensions
- Product categories
- Trade agreement
- Cost price

Please select which elements need to be added to the workflow

Identification	<input type="checkbox"/> No
Reference groups	<input type="checkbox"/> No
Units of measure	<input type="checkbox"/> No
Prices	<input type="checkbox"/> No
Related products	<input type="checkbox"/> No
Bar codes	<input type="checkbox"/> No



For *Physical dimension*, *Cost Price*, and *Product Categories*, application allows the user to select the display mode from the following options: Standard and Grid.

The screenshot shows a configuration window titled "Configure data entry workflow template". On the left, a vertical list of steps is shown: "Welcome" (checked), "Configuration" (checked), "Product main data" (checked), and "Physical dimensions" (selected). The main area contains the instruction "Please select the display mode for the product physical dimensions field group" and a dropdown menu labeled "Display mode" with "Standard" selected.

For *Trade agreement*, application allows the user to select the default relations.

The screenshot shows a configuration window titled "Configure data entry workflow template". On the left, a vertical list of steps is shown: "Welcome" (checked), "Configuration" (checked), "Product main data" (checked), "Physical dimensions" (checked), "Product categories" (checked), and "Trade agreement" (selected). The main area contains the instruction "Please select the default relation of the trade agreement to use in the workflow" and a dropdown menu labeled "Default relation" with "Price (purch.)" selected.

For the *Warehouse Items*, application allows the user to enable the following information in the template:

- Default receipt location
- Default issue location
- Picking location
- Select Warehouses



## Configure data entry workflow template

- Welcome
- Configuration
- Product main data
- Physical dimensions
- Product categories
- Trade agreement
- Cost price
- Warehouse items
- Summary

Please select the language to create product translation in the workflow

### Default receipt location

No

Default issue location

No

Picking location

No

[+ New](#) [Delete](#)

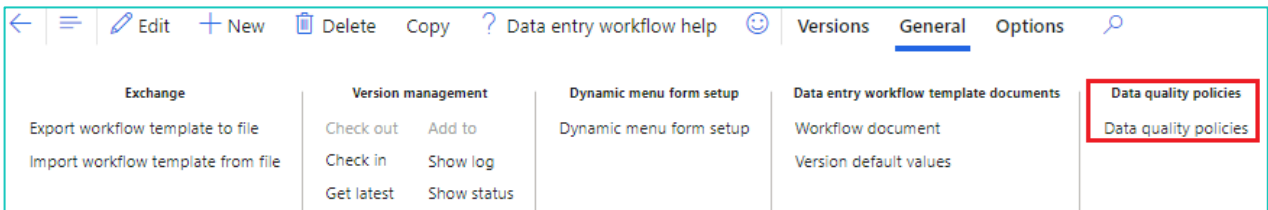
<input type="radio"/>	<input type="checkbox"/>	Warehouse	<input type="checkbox"/>
<input checked="" type="radio"/>			<input type="checkbox"/>



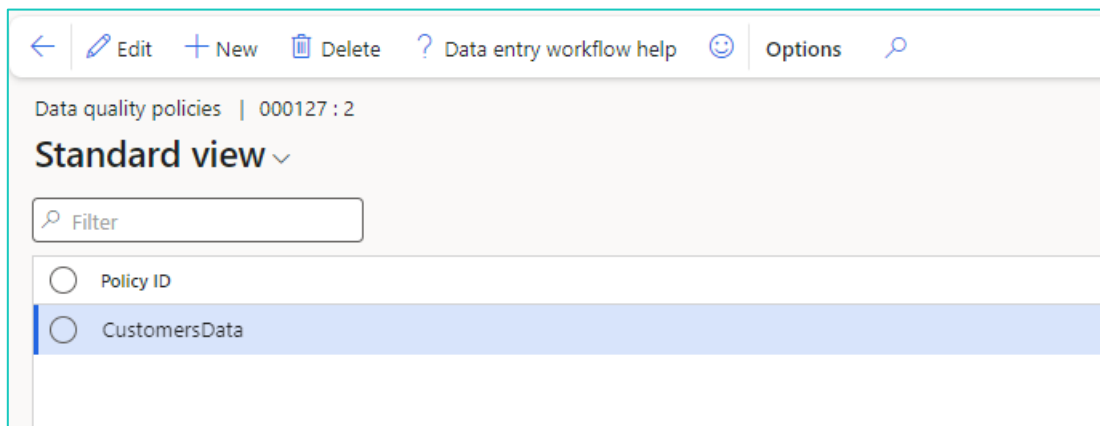
### 2.3.3 Ability to limit data quality policy for Workflow Templates

This enhancement will be applicable only if the Data quality studio is also installed on the F&SCM instance. As per the current implementation of data entry workflow, if data quality policies are configured to be executed for the Data entry workflow templates, then all the active data quality policies will be applicable on the data entry workflow as well.

This enhancement will allow the template designer to select the data quality policies which must be applicable on a data entry workflow template. In the *General* action tab, a new option *Data quality policy* has been added.



On clicking *Data quality policy*, application will prompt a pop-up which will allow the user to specify the data quality policies that must be applicable while creating or editing a record using the workflow template.

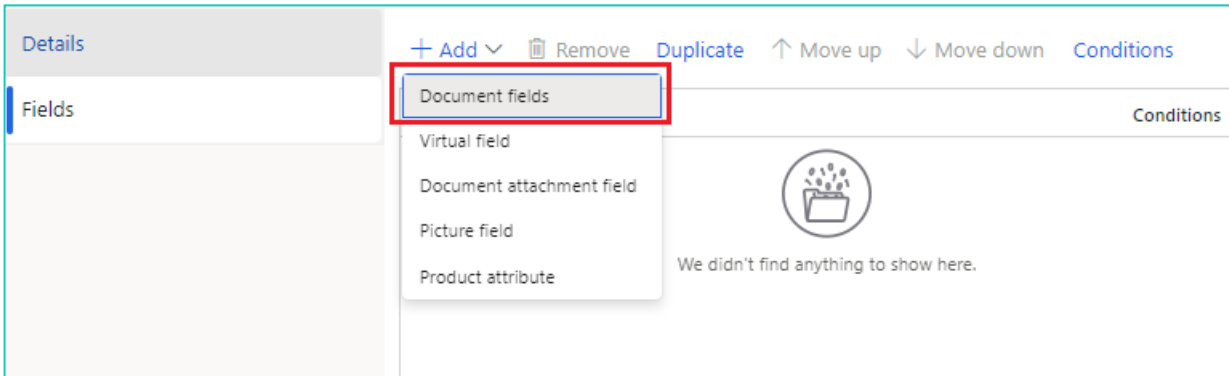


This pop-up will allow the user to add the data quality policies by clicking on New button. To delete an existing data quality policy, user need to select the data quality policy and click on Delete button.

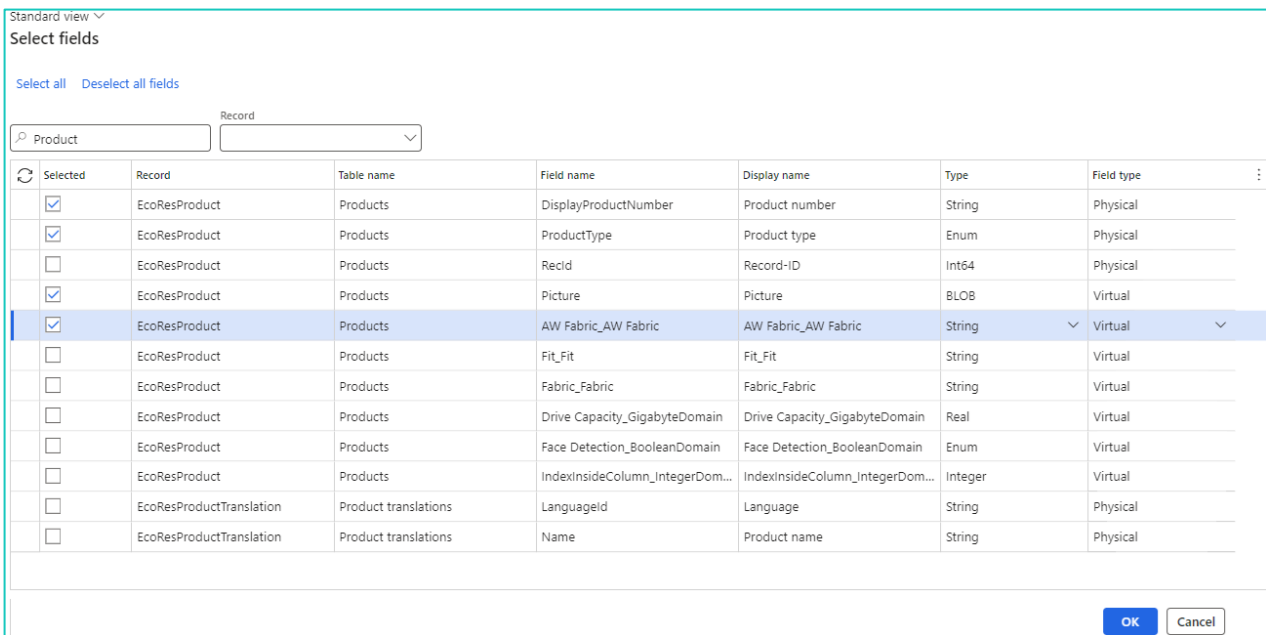


### 2.3.4 Ability to select multiple fields from documents

This enhancement will allow the user to select the multiple fields from a document at once. The existing option 'Add field from document', which allows the user to select one field at a time has been replaced with *Document fields* option.



On clicking Document fields button, application will prompt a pop-up that will allow the user to select multiple documents.



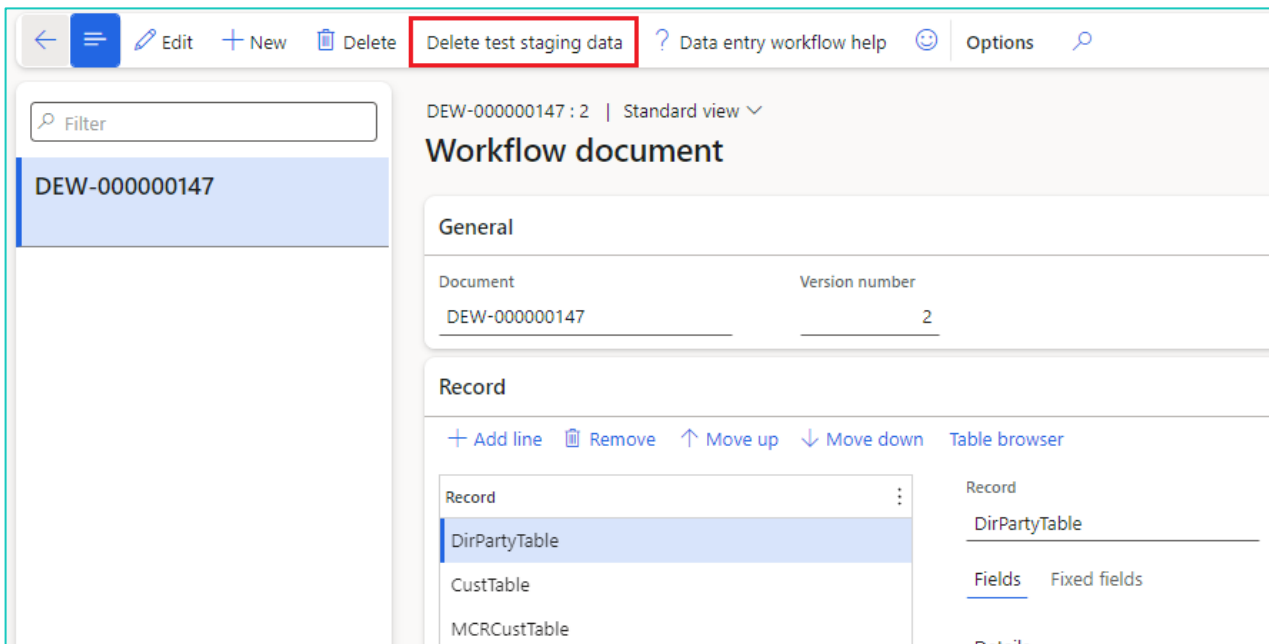
On click of OK button, the selected field will be added to the fields grid.



### 2.3.5 Ability to delete test staging data

As per the current implementation of the Data entry workflow, user cannot delete a workflow document if it has any test staging data (Data created while the template is activated in test mode).

This enhancement will allow the user to delete the test staging data for a selected document. A new button named, *Delete test staging data*, has been added on the Workflow document page.



On the click of this button, application will delete the test data related to the selected document.



### 2.3.6 Ability to modify test staging data

As per the current implementation of the Data entry workflow, application allow a user to view the Fields value of a step by clicking on the *Field values* button available on the Tracking details list grid of the Workflow page.

Tracking details list				
History <b>Field values</b> Reset Post actions execution				
<input type="radio"/>	Step name	Description	Step status	Elapsed time
<input checked="" type="checkbox"/>	Customer Details	Customer Details	Ended	0 hours, 6 minutes.
<input type="checkbox"/>	Approval	Approval	Assigned	0 hours, 6 minutes.

On clicking *Field values* button, application prompts a pop-up that allows the user to view the value of fields in the workflow instance. User can also view the history by clicking on the *View history* icon.

Standard view

### Workflow field values

Customer Details

Name	AB30091	Terms of payment	Net10	Customer account	AB30091	Currency	USD
Credit limit	10,000.00	Credit rating	Good	Mandatory credit limit	<input type="checkbox"/> No		
Email address	abhadana@to-increase.com	Email address purpose					
Phone	09871765556	Phone purpose	Other				

On clicking the *View history* icon, application will populate the history of the changes made for the field. There will be an additional button, **Update**, that will allow the user to update the value of the field.

'Terms of payment' Field value history

Update

Value	User	Date/Time
Net10	abhadana	9/30/2024 11:12:12 AM

Update value

FIELD DEFAULT VALUE

New value

Cash

OK





## 2.4 Release 10.0.40.15

### 2.4.1 Customer template design accelerator follow-up enhancement

As per the current implementation of data entry workflow, a user can define the following elements in a customer template using template accelerator framework:

- Customer Main Data
- Address Information
- Contact Information

This enhancement will allow a data entry workflow user to also define the following elements as well:

- Customer Contact Person
- Customer Bank Accounts

#### Configure data entry workflow template

Welcome

Configuration

Summary

Please select the elements to create for your workflow.

Customer main data	Performs the base operations for customer template accelerator scenarios
<input type="radio"/> No	
Customer address information	Define customer addresses in your template
<input type="radio"/> No	
Customer contact information	Define customer contact information in your template
<input type="radio"/> No	
Customer contact person	Define customer contact persons in your template
<input type="radio"/> No	
Customer bank accounts	Define customer bank accounts in your template
<input type="radio"/> No	

For the *Contact person*, application allows the user to select from the following information:

1. General
2. Phone
3. Email
4. Fax and,
5. Address



### Configure data entry workflow template

- Welcome
- Configuration
- Customer main data
- Customer contact person**
- Customer bank accounts
- Summary

Please select what elements should be configured for contact person

General  
 Yes

Phone  
 No

Email  
 No

Fax  
 No

Address  
 No

For the *Bank account*, application allows the user to select from the following information:

- 1. Identification and,
- 2. Bank details

### Configure data entry workflow template

- Welcome
- Configuration
- Customer main data
- Customer contact person
- Customer bank accounts**
- Summary

Please select what elements should be configured for bank accounts

Identification  
 Yes

Bank details  
 No



## 2.4.2 Product template design accelerator follow-up enhancement

As per the current implementation of data entry workflow, a user can define the following elements in a product template using template accelerator framework:

- Product Main Data

This enhancement will allow a data entry workflow user to define these new elements as well:

- Product image
- Product translation
- Unit Conversions
- Product attributes

**Configure data entry workflow template**

Please select the elements to create for your workflow.

Product main data	Performs the base operations for product template accelerator scenarios
<input checked="" type="checkbox"/> Yes	
Product images	Define product images in your template
<input checked="" type="checkbox"/> Yes	
Product translation	Define product translation in your template
<input checked="" type="checkbox"/> Yes	
Unit conversion	Define unit conversion in your template
<input checked="" type="checkbox"/> Yes	
Product attributes	Define product attribute in your template
<input checked="" type="checkbox"/> Yes	

For the *Product image*, application allows the configure the following information:

- Product Location: Product location can be selected as Product or Released product, depending on where the images need to be stored
- Attachment document type: Since images are going to be stored as document handling entries on either a product or released product, we need to configure what document handling type should we use for these entries.

Please select which elements need to be added to the workflow

Picture location

Product

Released product

Attachment document type

Image



For the *Product translation*, application allows the configure the following information: *Name*, *Description*, and *Languages*.

### Configure data entry workflow template

- ✓ Welcome
- ✓ Configuration
- ✓ Product main data
- ✓ Product images
- Product translation
- Unit conversion
- Product attributes
- Summary

Please select the language to create product translation in the workflow

Name field  Yes

Description field  Yes

+ New  Delete

<input type="checkbox"/>	<input type="checkbox"/>	Language	
<input checked="" type="checkbox"/>	<input type="checkbox"/>		* ▾

Back Next Cancel

For the *Unit conversion*, application allows the configure the following information: *From Unit*, *To Unit* and *Rounding*.

### Configure data entry workflow template

- ✓ Welcome
- ✓ Configuration
- ✓ Product main data
- ✓ Product images
- ✓ Product translation
- Unit conversion
- Product attributes
- Summary

Please specify the setup to create product unit conversion in the workflow

+ New  Delete

<input type="checkbox"/>	<input type="checkbox"/>	From unit	To unit	Rounding	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	* ▾	* ▾	To nearest	▾

Back Next Cancel



For the *Product attributes*, application allows the select the attributes to be included in the template from the list of product attributes.

**Configure data entry workflow template**

Please select the product attribute to create field in the workflow

Filter  Category hierarchy  Category   Not included on template

AVAILABLE		
Name	Attribute type name	Type
<input checked="" type="radio"/> Anti-Reflect	Anti-reflective available	Text
<input type="radio"/> Auction End Date	DateTimeDomain	DateTime
<input type="radio"/> Auction Res Price	CurrencyDomain	Currency
<input type="radio"/> Auction Start Price	CurrencyDomain	Currency
<input type="radio"/> AW Fabric	AW Fabric	Text
<input type="radio"/> AW Fill	AW Fill	Text
<input type="radio"/> AW Material	AW Material	Text

Name

We didn't find anything to show here.

Back Next Cancel

### 2.4.3 Standard Segment and Sub-segment lookup filter extension to Data entry workflow template

This enhancement will enable users to apply the standard lookup filters for the Segment and Sub-segment fields from the standard F&SCM application to the Data Entry Workflow Template as well. This applies to both customer and vendor areas.

### 2.4.4 Conditional configurable lookup extensions to data entry workflow templates

This enhancement will allow the user to use the conditional configurable lookup (configurable lookups which should be populated based on the value of another field) configured in Data quality policy while adding or amending a record using the data entry workflow template.

### 2.4.5 Workflow assignment notifications

This enhancement will allow the user to configure the workflow assignment notification while assigning roles or user to each step. While assigning roles or users to a step, application will allow the user to enable email for each assignment for that step. A new checkbox field named as *Enable email* has been added on the Assignment tab which will allow the user to enable or disable email notification for each assignment.

If the assignment has been enables for any Role or Team, then the application will trigger the email notification to all the users who are part of that team once the workflow reaches that step.



Application also allows the user to select the email template from the email templates configured on *System email templates page (System administration -> Setup -> Email)*.

Type	Assignment	Organization assignments	Conditions	Enable email
Role	System administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ASSIGNMENT NOTIFICATION

Notification email template

Following tags can be used in the html email template for email notification:

- WorkflowId: This tag will be replaced by workflow id.
- TemplateName - replaced with workflow template name
- StepName - replaced with the name of the step
- StepDescription - replaced with step description
- TitleFields: This tag will be replaced by the title fields stored on the workflow instance.
- WorkspaceURL: This tag will be replaced by the url that will navigate the user to the workspace.

Below is the screenshot of the sample template:

```
1 <p>Hello, </p>
2
3 <p>A new workflow task has been created for workflow <B>%WorkflowId%</b></p>
4
5 <P> Record details: <B>%TitleFields%</b></p>
6 <p><u><a href = "%WorkspaceURL%">Go to all tasks assigned to me</a></u><p>
7
```

Note:

- Please make sure that the Sender email address configured for the email template must be the same as the username configured on the SMTP settings tab of the Email parameter page.

### System email templates

Email ID: abhadana@t | Email description: | Sender name: | Sender email:

**General**

Default language code: en-gb | Priority: Normal | Batch group:



# Email parameters

Configuration

**SMTP settings**

Microsoft Graph settings

Test email

### SMTP settings

[Test connection](#)

#### SERVER INFORMATION

Outgoing mail server

SMTP port number

SSL/TLS required  
 Yes

#### AUTHENTICATION

Authentication required  
 Yes

**User name**

Password

#### ADDITIONAL RESOURCES

[View email history](#)

[Batch email sending status](#)

[Email distributor batch](#)



## 2.5 Release 10.0.39.14

### 2.5.1 Customer template design accelerator

This enhancement will allow a DEW user to configure a customer template using the design accelerator configured in the application. To use the design accelerator, application will allow the user to use the “Configure step” button to select the fields for the template.

Data entry workflow templates | Standard view ▾

### 000172 : Cust\_aCCelerator PO

**General**

Template 000172	Category Cust ▾	Change set 0
Name Cust_aCCelerator PO	Version management	<b>VERSION</b> Version number 1

**Workflow diagram**

Edit Refresh Select fields **Configure step**

Customer Details

Workflow: 000172, Version: 1

On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

1. Select the template.

### Configure data entry workflow template

● Welcome  
○ Configuration  
○ Summary

Use this wizard to configure your data entry workflow template. Please select a template type to continue

Template accelerator type

None  
 Product  
 Customer  
 Vendor

2. Enable the field groups (from Dynamics 365) using which you want to create the data entry workflow template and click on **Next** button.





Please select the elements to create for your workflow.

Customer main data Performs the base operations for customer template accelerator scenarios  
 No

Customer address information Define customer addresses in your template  
 No

Customer contact information Define customer contact information in your template  
 No

3. Select the customer template type and enable the type of information that you want to use from customer basic details (main data) and click on Next button.

Please select what customer elements need added to the workflow

Customer template type  
Organisation

Identification  
 Yes

Credit information  
 Yes

Tax information  
 Yes

4. Select the contact address information field using the arrow buttons and click on Next button.

Configure data entry workflow template

Please select the address elements to create in the workflow

Purpose field  
 No

AVAILABLE

- Address application object
- Country/region
- Street
- District
- Street number
- Building complement
- Post box
- Street code

SELECTED

- Address application object
- Postcode
- City
- County
- State or province

Note: You can enable “Purpose field” to allow the user to configure purpose field for customer address information.



5. Enable the contact information fields that you want to configure on the template and click on Next button.

**Configure data entry workflow template**

Progress list (left):

- ✓ Welcome
- ✓ Configuration
- ✓ Customer main data
- ✓ Customer address information
- Customer contact information**
- Summary

Main content:

Please select the contact information elements to create in the workflow

Individual fields  Yes

Phone  Yes

Email  Yes

Fax  No

Purpose field  Yes

6. Click on the **Finish** button to finish selecting the fields.

**Configure data entry workflow template**

Progress list (left):

- ✓ Welcome
- ✓ Configuration
- ✓ Customer main data
- ✓ Customer address information
- ✓ Customer contact information
- Summary**

Main content:

Click on Finish button to save the changes in workflow template step.

Buttons: Back, Finish, Cancel

On the click of **Finish** button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected.

User can navigate to the individual fields and can remove the field(s) if needed.



## 2.5.2 Product template design accelerator

This enhancement will allow a DEW user to configure a product template using the design accelerator configured in the application. To use the design accelerator, application will allow the user to use the “Configure step” button to select the fields for the template.

000174 : Prod\_Template\_PO

**General**

Template 000174	Category ▼	Change set 0	Version name
Name Prod_Template_PO	Version management	VERSION Version number 1	Status Draft

**Workflow diagram**

Finish + Add Remove Add dependency Copy Cut Paste Refresh Select fields **Configure step**

Product Details

Workflow: 000174, Version: 1

On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

1. Select the template.

Welcome

Configuration

Summary

Use this wizard to configure your data entry workflow template. Please select a template type to continue

Template accelerator type

None

Product

Customer

Vendor

2. Enable the field groups (from Dynamics 365) using which you want to include in the data entry workflow template and click on **Next** button.

**Configure data entry workflow template**

Welcome

Configuration

Summary

Please select the elements to create for your workflow.

Product main data  Yes Performs the base operations for product template accelerator scenarios



3. Select the customer template type and enable the product main data that you want to include in the data entry workflow template and click on Next button.

**Configure data entry workflow template**

Please select which elements need to be added to the workflow

Identification  Yes

Reference groups  Yes

Units of measure  Yes

Prices  No

Main retail category  No

4. Click on the **Finish** button to finish selecting the fields.

**Configure data entry workflow template**

Click on Finish button to save the changes in workflow template step.

Back Finish Cancel

On the click of **Finish** button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected.

User can navigate to the individual fields and can remove the field(s) if needed.



### 2.5.3 Vendor template design accelerator

This enhancement will allow a DEW user to configure a vendor template using the design accelerator configured in the application. To use the design accelerator, application will allow the user to use the “Configure step” button to select the fields for the template.

Data entry workflow templates | Standard view ▾

## 000175 : Vendor\_Template\_PO

**General**

Template	Category	Change set	Version name
<input type="text" value="000175"/>	<input type="text" value="Vend"/>	<input type="text" value="0"/>	<input type="text"/>
Name	Version management	<b>VERSION</b>	Status
<input type="text" value="Vendor_Template_PO"/>	<input type="text"/>	Version number	<input type="text" value="Draft"/>
		<input type="text" value="1"/>	

**Workflow diagram**

Finish + Add ▾ Remove Add dependency Copy Cut Paste ▾ Refresh Select fields **Configure step**

Workflow: 000175, Version: 1

On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

1. Select the template.

### Configure data entry workflow template

- Welcome
- Configuration
- Summary

Use this wizard to configure your data entry workflow template. Please select a template type to continue

Template accelerator type

- None
- Product
- Customer
- Vendor

2. Enable the field groups (from Dynamics 365) using which you want to create the data entry workflow template and click on **Next** button.



### Configure data entry workflow template

- Welcome
- Configuration
- Summary

Please select the elements to create for your workflow.

Vendor main data	Performs the base operations for vendor template accelerator scenarios
<input type="radio"/> No	
Vendor address information	Define vendor addresses in your template
<input type="radio"/> No	
Vendor contact information	Define vendor contact information in your template
<input type="radio"/> No	

3. Select the vendor template type and enable the type of information that you want to use from vendor basic details (main data) and click on Next button.

### Configure data entry workflow template

- Welcome
- Configuration
- Vendor main data
- Vendor address information
- Vendor contact information
- Summary

Please select what customer elements need added to the workflow

Vendor template type  
Organisation

Identification  
 Yes

Credit information  
 Yes

Tax information  
 Yes

4. Select the contact address information field using the arrow buttons and click on Next button.

### Configure data entry workflow template

- Welcome
- Configuration
- Vendor main data
- Vendor address information
- Vendor contact information
- Summary

Please select the address elements to create in the workflow

Purpose field  
 No

AVAILABLE		SELECTED
<input type="radio"/> Address application object		<input type="radio"/> Address application object
<input checked="" type="radio"/> Country/region	→	<input checked="" type="radio"/> Postcode
Street		City
District		County
Street number		State or province
Building complement		
Post box		
Street code		

Note: You can enable “Purpose field” to allow the user to configure purpose field for customer address information.



5. Enable the contact information fields that you want to configure on the template and click on Next button.

**Configure data entry workflow template**

Please select the contact information elements to create in the workflow

Individual fields  Yes

Phone  Yes

Email  Yes

Fax  No

Purpose field  No

6. Click on the **Finish** button to finish selecting the fields.

**Configure data entry workflow template**

Click on Finish button to save the changes in workflow template step.

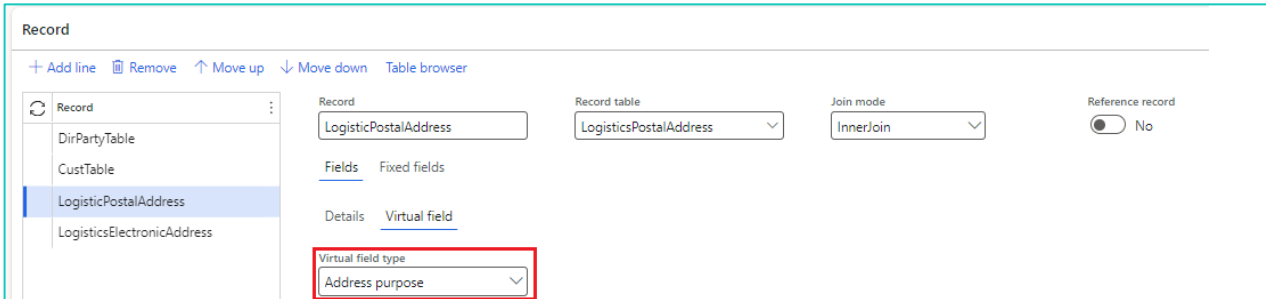
Back Finish Cancel

On the click of *Finish* button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected. User can navigate to the individual fields and can remove the field(s) if needed.



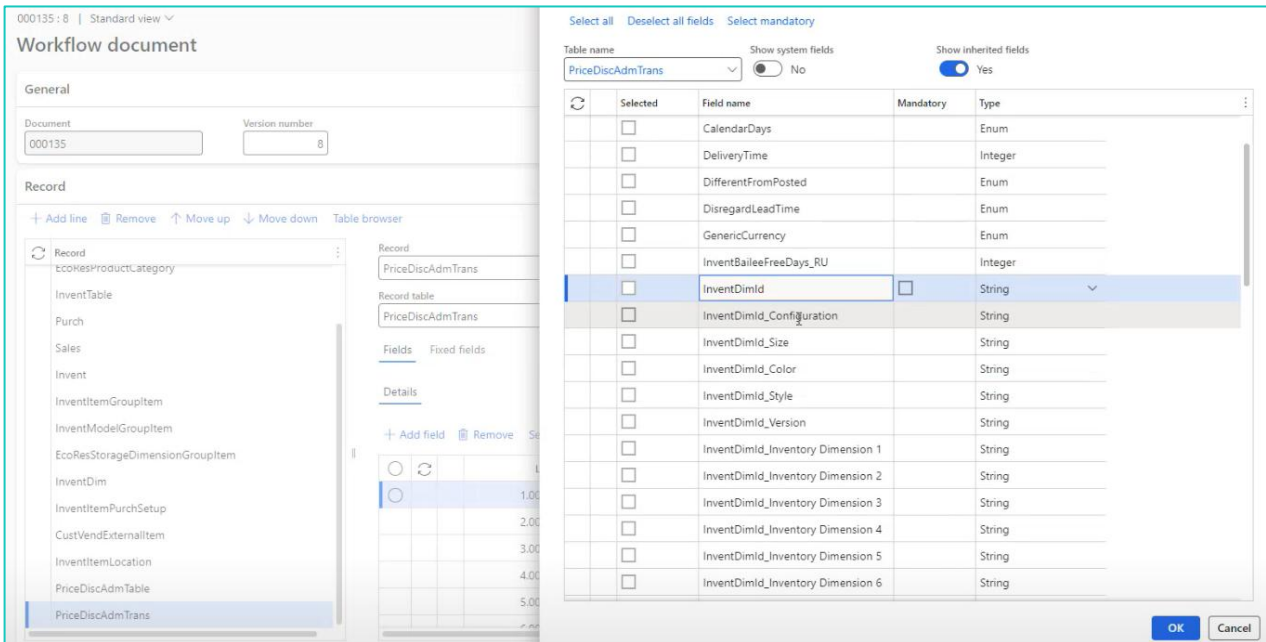
## 2.5.4 Add purpose selection for Addresses and contact information

The standard F&SCM application allows the user to specify the purpose for the address and contact information being specified. This enhancement will allow the data entry workflow user to configure the purpose field (As a virtual field) to specify the purpose field for the address and contact information.



## 2.5.5 Inventory dimensions as virtual fields in data entry workflow template

This enhancement will allow the user to select the inventory dimensions field while creating a workflow document for a record which has inventory dimensions.



While the workflow is being executed, the application will treat the inventory dimension field as virtual fields.





## 2.6 Version 10.0.38.13

### 2.6.1 Added support for DQS webservice configurable lookup

In the latest release of Data Quality Studio, a new feature has been introduced that allows a configurable lookup to be defined based on a webservice. The new way of executing the configurable lookup was not working correctly from Data entry workflow. Moreover, the existing configurable lookup options (Defined list & Dynamic query) stopped working as well.

In order to overcome these issues, we are now releasing a new version of Data entry workflow, along with a new version of Data Quality Studio that will solve the issues and make the webservice configurable lookup available in Data entry workflow as well.



## 3. Bug Fixes

### 3.1 10.0.41.18

ID	Title
208370	<p>Jobtype Default - work description length on DEW not present same behavior as in standard D365</p> <p>This fix will ensure that the details captured for Memo type fields must not be truncated when the data is transferred into F&amp;O after approval.</p>

### 3.2 10.0.41.17

ID	Title
204537	<p>Error creating Maintenance Plan Lines</p> <p>This fix will ensure that user is successfully able to create and activate the workflow for Maintenance Plan lines to capture maintenance plans</p>

### 3.3 10.0.41.16

ID	Title
201928	<p>CS00234434   DEW -Lookup fields not inserting the correct information</p> <p>This fix will ensure that while selecting a Bank account using the drop-down, application must populate the bank account in the field so that the record can be saved.</p>

### 3.4 10.0.40.15

ID	Title
187975	<p>Duplicate tables created when using InventTable extensions</p> <p>This fix will ensure that when processing a released product template which has MCRIInventTable, WHSInventTable, RetailInventTable in the Workflow document, application must allow the user to create the record without any error</p>
195663	<p>Int64 field not showing up on DEW template</p> <p>This fix will ensure that Int64 fields that are not surrogate keys will be displayed in a data entry workflow template and will store and transfer the value to the final field without issues.</p>

### 3.5 10.0.39.14

ID	Title
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184432	<p>New version Create with blank Template giving error while adding new fields in the template.</p> <p>This fix will ensure that while creating a new version using blank template, application should allow the user to create steps and select fields for steps.</p>
186403	<p>Approve label spelling is wrong for grid view.</p> <p>The spelling of “Approve” label was incorrect for grid on the approve steps. The spelling has been corrected.</p>
186565	<p>Selecting fields before Country/region field in the LogisticsPostalAddress table does not populate data correct on record.</p> <p>This fix ensures that while capturing the address details, the application must ensure that the address is saved regardless of the sequence of the field in the workflow template.</p>
187355	<p>The sequence does not appear the same in the DEW Instance as defined in the configuration lookup.</p> <p>This fix will ensure that the sequence for configuration look (User defined list) must be same as configured in the DQS application.</p>

### 3.6 10.0.38.13

ID	Title
	<p>Field values form cannot be opened if the workflow record name contains spaces.</p> <p>We have recently discovered that if document records are defined with spaces, the field values, as well as the grid control functionality is not working properly. We have solved the issue, yet we recommend defining the document records without a space in their name.</p>
	<p>Default values are not populated for specific enums and reference fields</p> <p>Solved the default values for reference fields. For enums, we have changed the default value lookup to show the technical name instead of the value.</p>



## 4. Common features

Staedean is offering various add-on solutions. Some features and technical solutions are common or could be common for all our solutions on the Dynamics 365 Finance and Supply Chain Management platform. As of November 2022, we will start leveraging a new common library model.

The common library model will be a centralized location where the new common features will be added automatically, and customers don't have to make an additional effort to update the build pipelines after the first enablement of this model.

ISV licensing is technically supported with a code signing certificate. The certificate we must use expires every three years, next up for renewal in 2023. Soon, our solutions will refer to this common model for the code signing certificate, instead of maintaining it separately in all our solutions.

Next to technical content, the common library comes with features which are beneficial to our customers. E.g. a Solutions Management dashboard gives a clear view of currently installed versions, status of license, option to renew licenses without any downtime, easy access to release notes and documentation, and the ability to leave feedback through the in-app feedback system.

The screenshot displays the 'To-Increase solution management' interface. On the left, there is a table of solutions with columns for 'Solution', 'Installed version', and 'Status'. The 'Advanced Discrete Manufacturing' solution is selected. On the right, a modal window titled 'Advanced Discrete Manufacturing' is open, showing a message 'SOLUTION IS NOT INSTALLED' and a table of licenses.

Solution	Installed version	Status
Advanced Discrete Manufacturi...		×
Advanced Project Management		×
Anywhere Mobility Studio		×
Business Integration Solution	10.0.99.999	☑
Data Entry Workflow		×
Data Modeling Studio		×
Data Quality Studio	10.0.18.2	☑
DynaRent	10.0.28.43	⊕
PLM Integration for Engineerin...		×
RapidValue BPM Suite	10.0.26.37	☑
Security and Compliance Studio		×

License	Status	Expiry date
Construction	🔒	
Equipment	🔒	
Advanced Project Management	🔒	
Product Engineering a	🔒	

On all Staedean forms, there is on the left-top of the forms a smiley icon in the menu where you can provide us feedback, suggestions, and ideas so we can learn how improve our solutions.



?

### To-Increase would love your feedback!

Please rate your experience in using the All solutions screen.

5 - Excellent

4

3

2

1 - Poor

Please tell us why you chose the rating. Additional insights would help us improve our products further.

Thank you for providing us feedback!

Your privacy is important to us. To protect your privacy, please don't include any personal information.



## 5. Known Issues and limitations.

In this section the known issues and limitations that are currently in DEW will be highlighted. These issues or limitations can also be due to standard Dynamics 365 limitations. Known issues and limitations:

- User can setup alerts as notifications. A data entity to continue with data outside of Dynamics 365 is not available yet.
- Diagram operations can sometime lead strange arrangement when complex scenarios are performed. If you ever get into a situation where the diagram is not looking correct, we suggest you remove the dependencies and then use Cut & Paste function to move the steps in the order that you prefer.
- Grid control has been released in Preview mode, which comes with some limitations:
  - We currently support 10 tables that can serve as grid data sources.
  - We can have fields from a single workflow document record in a grid.
  - We can only have 1 grid per Tab page.

We have items on the roadmap that will improve the product. If you want to learn about upcoming features, you can contact Staedean.

In general, the Data Entry workflow can work for any regular table and field, regardless of if it is part of the standard, an ISV solution, customization or configured custom field. We have concentrated our testing on master data entry: Customers, (Released) Products, Vendor and Vendor bank accounts. We did test some other tables as well. If there is any specific behaviour which needs attention to get the recording or processing better for your scenarios, please contact us so we can improve the solution.

Together with the solution, we provide sample data entry workflow templates. The tutorials are provided 'as-is' and not supported as part of the main application. The examples are mainly intended for learning and demo purposes. Before using them in a production environment, you must verify if they will work as per your expectations.

Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public preview and will be made generally available in future releases, in other cases, they are already general available, and you have the choice to activate them. Currently, we are not testing compatibility with all new features or combinations. Once a feature is enabled at the customer environment and in case of any issues or questions related to new standard features and our solutions, kindly contact us via Staedean support.